CONFERENCE MANAGEMENT APPROVAL PROCESS
(INCLUDING MAJOR INTERNATIONAL CONFERENCES)
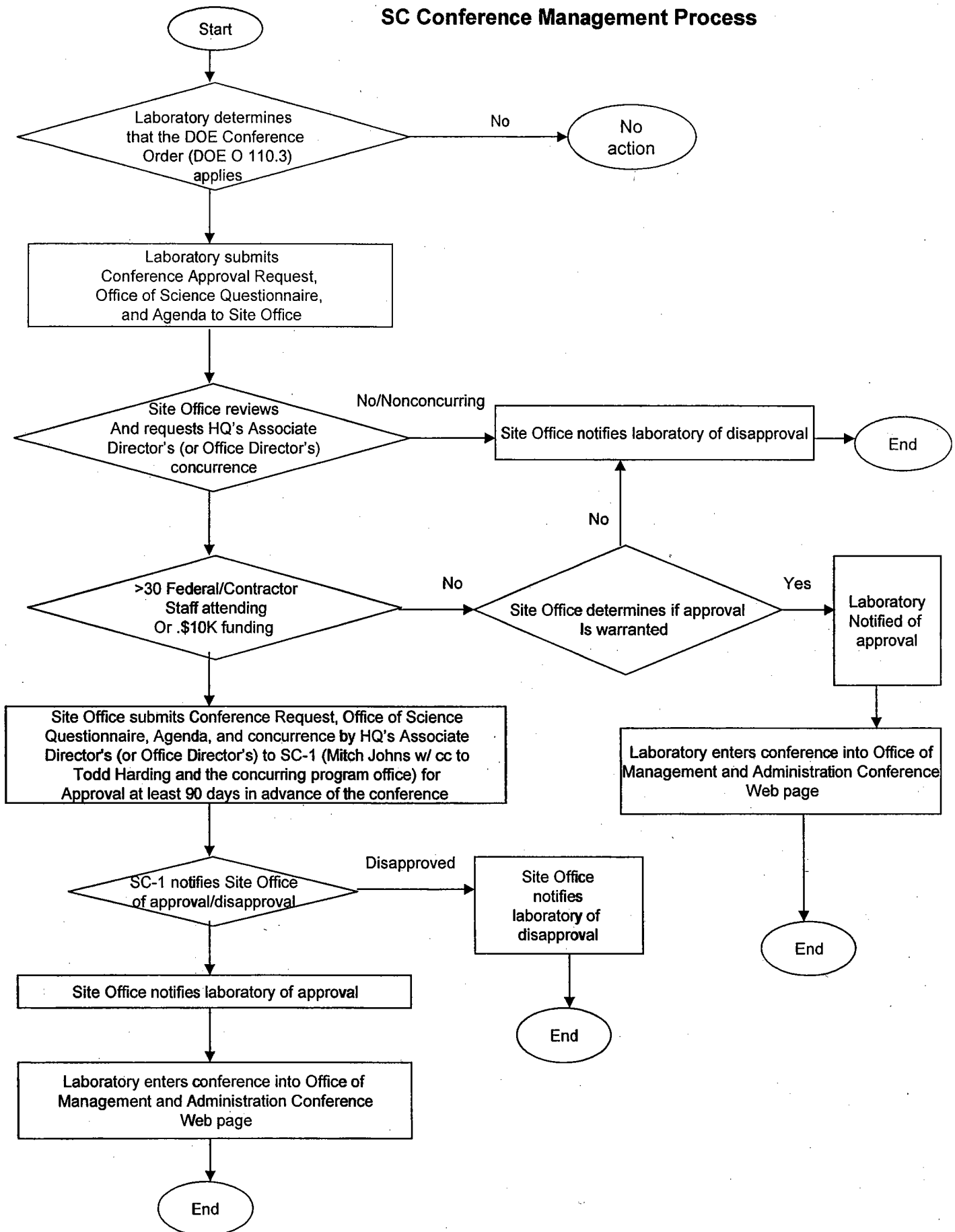
1) Laboratory determines that DOE Conference Management Order (DOE O 110.3) applies to the proposed meeting.
2) If determined to be a conference, the Laboratory submits conference approval request to the appropriate Site Office (this includes Laboratory employees traveling to international conferences). Submittal should include the following:
   a. Conference Approval Request (using the suggested format from DOE O 110.3);
   b. Office of Science Questionnaire;
   c. Detailed agenda for the conference (required)
3) Site Office reviews the request. For sponsorship, co-sponsorship, travel to a major international conference, or funding of a conference where greater than 29 DOE or contractor employees are attending, the Site Office should process the request for SC-1 approval:
   a. Determine sponsoring SC program office;
   b. Request Associate Director or Office Director (if sponsoring office is in SC) or other program official (for non-SC conferences) concurrence on the conference. This request can be made via e-mail.
4) Once the sponsoring program office has concurred, submit the approval request electronically to SC-1. The submittal should be made to Mitch Johns with a copy to Todd Harding and the concurring program office, and should include the following:
   a. Conference Approval Request (using the suggested format from DOE O 110.3);
   b. Office of Science conference sponsorship questionnaire;
   c. Detailed agenda for the conference;
   d. Concurrence by sponsoring program office (AD if SC sponsorship)
5) Approval is then granted or denied by SC-1
6) Mitch Johns makes notification to Site Office of SC-1 decision
7) Site Office notifies Laboratory of SC-1 decision
8) If approved, conference is entered into the Office of Management and Administration Conference web-based database.

For conferences where less than 30 DOE or contractor employees are attending, the Site Office shall determine if the sponsorship or co-sponsorship or funding of a conference (or travel to a major international conference by DOE or Laboratory employees) is at a level that the conference should be approved by SC-1 or if it can be approved locally. Generally, for all conferences that are being funded at (or travel costs exceed) a level greater than $10,000, they should be submitted to SC-1 for approval using the above process. For conferences with less than 30 contractor employees, and funded at less than $10,000, the Laboratory will review and approve these conferences, ensuring that the conference is in an appropriate academic location, has a topic relevant to the Office of Science, or other DOE program office and missions and goals, and that the agenda supports a relevant and robust academic discourse that brings credit to the office's activities and programs. The Site Office shall validate that the Laboratory has established

a procedure for implementing DOE Order 110.3 and this guidance. If you need to discuss the guidance with SC, please contact Mitch Johns.

SC Conference Management Process

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  <  Laboratory determines  >---- No ----> ( No action )
   \ that the DOE Conference /
    \ Order (DOE O 110.3)   /
     \    applies          /
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  +-------------------------+
  |   Laboratory submits    |
  | Conference Approval     |
  |  Request, Office of     |
  | Science Questionnaire,  |
  | and Agenda to Site Office |
  +-------------------------+
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   /‾‾‾‾‾‾‾‾‾‾‾‾‾\
  <  Site Office reviews  > -- No/Nonconcurring --> [ Site Office notifies laboratory of disapproval ] --> ( End )
   \ And requests HQ's     /
    \ Associate Director's /
     \ (or Office Director's)/
      \  concurrence       /
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- Start
- Laboratory determines that the DOE Conference Order (DOE O 110.3) applies — **No** → No action
- Laboratory submits Conference Approval Request, Office of Science Questionnaire, and Agenda to Site Office
- Site Office reviews And requests HQ's Associate Director's (or Office Director's) concurrence — **No/Nonconcurring** → Site Office notifies laboratory of disapproval → End

- >30 Federal/Contractor Staff attending Or .$10K funding — **No** → Site Office determines if approval Is warranted
  - **No** → Site Office notifies laboratory of disapproval
  - **Yes** → Laboratory Notified of approval → Laboratory enters conference into Office of Management and Administration Conference Web page → End

- Site Office submits Conference Request, Office of Science Questionnaire, Agenda, and concurrence by HQ's Associate Director's (or Office Director's) to SC-1 (Mitch Johns w/ cc to Todd Harding and the concurring program office) for Approval at least 90 days in advance of the conference

- SC-1 notifies Site Office of approval/disapproval — **Disapproved** → Site Office notifies laboratory of disapproval → End

- Site Office notifies laboratory of approval → Laboratory enters conference into Office of Management and Administration Conference Web page → End

Conference Information Required:

1. Conference Organizer and Contact Information

2. Title of the conference and a one paragraph analysis of how holding this conference supports the Office of Science missions within your organization.

3. Conference Agenda, including duration and any planned activities beyond the agenda such as site visits, after hours dinners etc.

4. Conference Attendees:

    Provide by category the estimated number of estimated attendees that are SC, DOE, other Federal agency employees.

    Provide by laboratory the number of estimated laboratory employees attending.

    Provide the estimated number of attendees not identified in # 3 and #4 by category such as University, Foreign Visitors etc.

5. Location of the conference and a statement as to why that location was chosen, including security concerns if applicable.

6. Estimated costs for holding the conference broken out by categories such as audio visual, conference room, refreshments, travel costs for the HOST only if location is not at their site, etc.

7. Estimated income from registration fees, sponsorships, etc.

8. For major international conferences, name of attendees and participation (speaker, presenter, attendee...)